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## **Charleston Conference 2008**

### **End of Year Monies: The Case for Congruence**

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Libraries in public universities and colleges, and sometimes within private institutions as well, are frequently called upon at the end of the fiscal-year cycle to spend-out not only the library's allocated budget, but also the unspent residue of the entire university budget. With dozens of individual accounts, the university must juggle all of the physical plant orders that did not arrive as expected, costs for benefits such as health insurance that were lower than projections, and leftover monies from departmental lines and campus units who failed to spend all of their allocations. As nonsensical as it often seems, spending out the budget to the last penny before fiscal year close is a regular routine and an annual challenge.

Libraries often play a role in end-of-year spending because libraries typically either have invoices in-hand or may quickly acquire products that are one-time purchases such as books, microfilm, datasets, or digital collections which we can order, pay the invoice, and have delivered within a very short turnaround time as required in the closing days of fiscal year. Sometimes the turnaround is measured in hours before the close of business for the last day of the fiscal year. If the library has a well-established

relationship with the university budget office, often the library will be among those units who first receive a contact call asking whether they can help spend money within a short time period. Furthermore, if the library is well-prepared with wishlist items, they can sometimes make a case for end-of-the-year funds to purchase items beyond their invoices in-hand.

In this paper, the authors discuss our particularly notable case of end-of-the-year money during the end of fiscal year 2007-2008. During the final two weeks of the fiscal year, we received an amount of end-of-year money equal to 62% of our regular annual allocated budget and we spent that amount within 10 days. The vast majority of those funds were spent on new digital purchases which were one-time expenses with limited ongoing costs. During this time, and in years past, we have been able to make a significant impact on the level of research materials available to Appalachian State University faculty and students.

We believe that with significant preparation, clear communication with vendors, and a strong relationship with the university budget office, other libraries could take advantage of the end-of-the-fiscal-year for purchasing digital collections or paying invoices. We also believe that via good communication with customers and preparation on the vendors' part, the vendors themselves can learn more about the details of the university spending calendar and take advantage of this opportunity to increase their sales. We offer here a narrative of our experiences, followed by advice for both vendors and for acquisitions/collection management librarians. Interesting problems and issues will be covered as well.

### **What is the end-of-the-year phenomenon?**

A fiscal year or budget year is the period used to calculate annual expenditures against budget allocations. In universities, the fiscal year sometimes coincides with the calendar year, January through

December. However, it more often runs on a July through June cycle with some variation across universities. The latter cycle places the busiest time of year in the summer rather than during the December holidays when most campuses in the U.S. and beyond are on holiday.

As the fiscal year progresses, campus units, such as the library, monitor budgetary allocations against expenditures, while the campus budget office as a whole keeps a watch over projected revenue from the state, from endowments, and from tuition and fees and compares that revenue to expenditures. Often it's hard to predict the future well enough to make these numbers match up. For example, during 2008, as endowment portfolios lost a third of their value (*The Chronicle of Philanthropy* <http://philanthropy.com/news/updates/6881/many-foundations-have-lost-almost-one-third-of-their-assets-chronicle-study-finds>) many private universities have frozen expenditures and started to develop plans for wide-scale budget cuts (<http://www.dailyprincetonian.com/2008/11/12/22071/>). The same scenario occurs in public universities, but with revenues typically tied more to state income taxes as well as tuition, with some impact from endowment income.

University budgets by and large do not roll over from year to year. This inability to carryover money from one fiscal year to the next necessitates careful and precise spending in the last weeks of the fiscal year to spend as much of the budget as possible. This is a political process in the sense that spending to the last dollar proves to funding agencies that all of the money was needed; and it is a procedural process, ensuring that there is a speedy turnaround for delivery of goods, materials, and resources. No matter how diligent the attempt to spend money within a fiscal year, there are often items that don't arrive as planned or projects which haven't reached a completion point as the fiscal year draws to a close. Examples would be large HVAC units for a gymnasium that are not delivered on-time and cannot be paid for before the fiscal close or benefits overhead that is allocated, but not used because personnel leave.

However absurd it may sometimes seem to spend the university's budget to the last penny, this process is part of the regular working procedure of many universities and colleges and not unfamiliar to librarians either. Within our own acquisitions departments, we try to pay invoices and purchase materials to the precise amount of our allocations. Operations and staffing budgets are usually managed in the same way by university units.

### **Background Information about Appalachian State University**

Appalachian State University is classed as a Carnegie Masters-L university (larger masters universities) in the mountains of northwestern North Carolina, is part of the University of North Carolina System, and is home to well over 12,000 undergraduate and 2,000 graduate FTE. The Library at Appalachian State has an annual collections budget in the range of \$3 million and our book collection is nearing 1 million items. The mission statement of the Library is "to assist those who pursue knowledge" and the most recent strategic plan focuses on four areas: learning, scholarship, engagement, and effectiveness. With a high level of participation in teaching and information literacy activities, the Library is well regarded on campus and receives very high marks in quantitative surveys such as LibQual+ and in qualitative measures such as anecdotes and feedback on our website and via email.

For the past eleven years, Appalachian has focused increasingly on electronic databases and electronic serials, allocating a larger portion of the budget every year towards materials which are available 24/7 online. Seventy-five percent of our typical annual budget is allocated for continuing expenditures. This may indicate perhaps a larger percent of our budget is spent on monographic purchases than in larger universities, but our smaller budget and FTE keeps our costs for electronic products on a lower scale in some instances, while book unit costs are the same for us as for any institution. In addition, Appalachian focuses a great deal of purchasing power on special collections, notably on the Appalachian Collection,

one of the best of its type in the country, a strong Music Library, and a strong teacher-preparatory Instructional Materials Center. These and our other special collections may tip the budget more strongly toward monographic purchases, but even though we are aware of these factors, expenses for continuing resources continue to grow and the online resources are among the most desired and requested by students and faculty.

In the Appalachian Library, end-of-the-year funding from the university has been common over the years. Normally this money has ranged from several thousand dollars to pay on-hand invoices to a hundred thousand dollars used to buy new resources, and as a percentage of the university's almost \$150 million budget, the numbers are small. Working collaboratively, the acquisitions team and the collection management team have almost always dedicated these end-of-year monies to one-time purchases. A decade ago and earlier, we purchased microform sets and paper back files of serials to which we subscribe, and encyclopedia-type sets which selectors found cost-prohibitive but valuable.

### **Appalachian State University's FY2008 Experience**

For FY2008, there was no signal that life would be different. In retrospect we did hear rumor that university-wide, staff and faculty retirements were up almost 300 percent over previous years, but we didn't appreciate the impact of that. During February and March, we, the head of the collection management team and the head of acquisitions, asked selectors to prepare wishlists of materials and to then make the preliminary contacts with vendors to determine the approximate pricing, access information, and licensing required for any digital products on their wishlists. Because our budget had grown through increased-enrollment formulae and tuition revenues during the year, selectors had already gone through a process of selecting new serials and databases – an atypical year for us, when normally, adding new continuing resources can be difficult. With the busy work of the past semester of adding new serials and databases slowing coming to a close, the heads of collection management and

acquisitions decided on a guideline to help make the end-of-the-year process more time-manageable.

We placed three restrictions on all wishlist items selected: (1.) wishlist resources had to be electronic or online only, rather than paper, microfilm, or in another physical format; (2.) items had to be one-time purchases with little if any ongoing fees; and (3.) all recommended purchases had to cost over \$10,000.

These restrictions were uncomfortable for many librarians who had their eye on an expensive encyclopedia set or a set of newspaper backfiles on microfilm. The restrictions also favored the humanities and social sciences to some extent, because many new digital collections available from ProQuest, Thomson Gale, and ReadEx are in the humanities and social sciences. Collections of digitized documents are crucial to work in the humanities and many social sciences, as opposed to disciplines, such as many in science or technology that are more centered on very current information. However, we believe that any subject collection manager can, with adequate research and preparation, find electronic backfiles and one-time purchases of data sets or other materials that are expensive and valuable to their patrons. These materials do exist and comprise a part of the world of resources not typically available to universities with our size collections budget. The best examples of cross-disciplinary resources which would have met our guidelines include:

- online journal backfiles such as those available from Blackwell-Wiley, Oxford, Springer, Sage, and Elsevier
- Table of Contents services from vendors such as Syndetic Solutions
- eBook collections such as those from Sage, Springer, and Gale, as well as the larger eBook vendors including ebl, eBrary, and netLibrary
- online newspapers backfiles such as those collections available from ProQuest and ReadEx

For the selectors, there were many steps in the process and those who prepared the most thoroughly, made it easiest for the acquisitions and collection management heads to negotiate the final deal. We

did divide the roles so that selectors were in charge of doing much of the legwork in identifying and researching products and prices, but that the head of acquisitions or of collection development was in charge of negotiating and agreeing to the final deal, negotiating licensing terms and access details, and essentially triggering the order and invoice. A breakdown of responsibilities is shown here:

Role of the Selector	Role of the Head of Acquisitions/Head of Collection Management
<ul style="list-style-type: none"> <li>Identify the product.</li> <li>Be ready to make the case for why it is needed and not duplicative of current subscriptions. Knowing faculty advocates for this resource is ideal.</li> <li>Define exactly what the product is: many products are confusing, with different subscription levels and puzzling nomenclature. A precise description of the exact product desired is crucial to moving quickly on deals.</li> <li>Identify the vendor contact person and their direct phone/email.</li> <li>Obtain a .doc/.pdf of the license if possible. (Because we use Ebsco as a subscription agent, we can often find sample product licenses in EbscoNet.)</li> </ul>	<ul style="list-style-type: none"> <li>Prompt selectors for wishlist items and give clear guidelines about any restrictions. Make sure that everyone understands the process and has the training and understanding in place to accomplish their goals.</li> <li>Compile a list of wishlist items from selectors.</li> <li>Vet requests to identify items that meet the restrictions. Focus on bringing a balance to the disciplinary foci of the requests so that there is either “something for everyone” or that urgent needs are met as priorities.</li> <li>Ask tough questions to the selectors. Attempt to run the process equitably and transparently.</li> <li>Talk openly and honestly with vendors about the possibilities for funds and purchasing. Talk with vendors before money may be available</li> </ul>

- Get a price quote in an email. We would also ask selectors to inquire about a getting pro-forma invoice from the vendor which would allow us to pay quickly if needed. This wasn't always possible, but when pro-forma invoices are a part of the suite of end-of-the-year tools, it makes the process of spending money faster and simpler.
- Provide a thorough summary for the head of acquisitions and be able to answer questions.
- Do *not* trigger an order or agree to terms, pricing, or indicate a probability that we will be able to purchase the item. The most serious problems in our process occurred when selectors indicated that we would certainly purchase a product. When we decided not to purchase – or wanted to negotiate pricing further – that flexibility was no longer possible, and vendors can be highly frustrated, and rightly so. It is unethical to misrepresent our intentions to buy something, and selectors had to understand this implicitly.
- and follow-up whether or not money is made available. Be honest about the library's needs and resources.
- Negotiate the price if possible. It never hurts to ask about discounts available consortially or otherwise. Sometimes there is a great amount of flexibility available in the pricing, especially if it means the difference between making a sale at the end of the fiscal year for a sales representative and not making the sale. Keep this in mind and negotiate accordingly. Negotiate fairly, reasonably, and with an attitude of professional friendliness.
- Request the license and provide a fast turnaround to the vendor.
- Trigger the order, pay the invoice, and hook up the product.



Concurrently with the selectors compiling their wishlists, the heads of acquisitions and collections management began to contact major vendors to give them a heads-up about our potential for end-of-year money. In many cases, we asked vendor representatives to review our holdings for their products and to make suggestions for collection additions from their products, using the same criteria we gave to library selectors. Though perhaps unorthodox, these requests pushed some of the research onto the vendor's plate; yet with so much information about Appalachian's degree programs and the databases to which we subscribe available on the university website, vendors had a wealth of data available to them to help self-identify products which would meet the research needs of our faculty. Also, vendors often had heard directly from our faculty members about products that were attractive, because of the companies' participation in disciplinary conferences and the vendor's outreach directly to faculty.

Some vendors jumped at the opportunity to prepare their lists of top products which would complement Appalachian's needs and current holdings. The best information came from a few vendors who took the ball and ran with it. They provided a quick list of 5-10 products which could be purchased with one-time funds and would complement our teaching and scholarship programs on campus. In the best cases, they gave us pricing estimates with discounts for the products, so that we could work with real numbers. We agreed that these were not price guarantees, and sometimes there would be room for negotiation, but the pricing quotes were invaluable in our attempts to advocate for the right resources at the right time. Now we were ready and waiting.

### **The Real Fun Begins**

In some instances, all of our preparation work would have been in vain. Perhaps the university would not have had any end-of-year funds, and our preparation would have been a nice exercise in fiscal preparedness and a learning opportunity to find the research materials available in the world and their approximate costs. However, in our case, the preparation paid off. In late May, Academic Affairs, the

unit which administers all of the disciplinary schools and departments, asked the Library whether we had any end-of-the-year expenditures were money to become available.

Because of our preparation work, we had a spreadsheet containing \$1.6 million worth of fantastic resources (we also had another \$750,000 in our pocket of second tier items based more on high prices than the worth of the content). Of that \$1.6 million, \$216,000 included invoices on hand that we were holding until the next year's budget was made available. An additional \$270,000 could be spent on invoices that were expected by fiscal year end, but were not currently in-hand. The rest of our wishlist included digitized newspaper collections, backfiles of serials and indices such as *Biological Abstracts*, and ebook collections.

In response to the email to the University Librarian from Academic Affairs, we answered with the most flexible position possible: we could spend any amount that they needed us to spend, up to \$1.6 million. We put the \$1.6 million into tiers: \$300,000 would be helpful at paying invoices on hand and expected. Were we to receive \$500,000, we could pay the invoices and purchase four new products. And if we had more money, we had identified several other digital resources that could be turned on within the guidelines (and therefore "received") by the end of the fiscal year and which would make a significant impact on research and teaching on the Appalachian Campus. Our response tried to impart a sense of flexibility: we weren't asking for \$1.6 million, but we could spend any amount of money they needed and could make it happen with a very short turnaround time.

On June 16, we received a heads-up phone call from the Office of Business Affairs that we would be receiving \$1.6 million to spend by June 30, essentially 11 business days. In retrospect, our preparedness and flexibility likely helped the business office to make an easy decision to trust us with a large portion of the end-of-the-year money from the university's budget – a much larger amount than normal caused

by projected expenses for employee benefits which were never realized. We were surprised, to say the least, but excited and ready to jump into gear.

Starting on the afternoon of June 16, the head of collections and the head of acquisitions began telephoning vendors to start the process of targeting the exact products from our wishlist spreadsheet, agreeing to a final price – and negotiating discounts whenever possible – and triggering an invoice, ideally a one-line invoice to be paid. Accompanying these responsibilities were complementary tasks such as reviewing licenses and getting them revised and signed, asking the right questions about the cataloging issues when relevant, and talking to the vendor technical support representatives in order to turn on access before the end of the fiscal year. In order to follow accounting policies, we explained to vendors that we had to “receive” the product, which meant turning on access which was available to our campus IP addresses, before June 30.

### **The Fine Art of Negotiating**

With every new product that we add to the collection, but primarily and especially with databases and journal packages, we have made it a policy to negotiate the price. To do this, we always ask questions such as:

- Can the price be lowered? We have often seen the price for products drop by as much as 75%, and it is not unusual for the cost of an electronic product to be cut in half after negotiations. Vendors do want the business, and the cost for them is rather scalable, since it involves more customer service, billing, and technical support – but the electronic “product” already exists.
- Are we eligible for any discounts through consortial opportunities or other arrangements? Appalachian State is a part of the Western North Carolina Library Network of three university libraries; SOLINET, the Southeastern Library Network; the Carolina Consortia which is a loosely affiliated buying group of public and private colleges and universities throughout North and

South Carolina; and the University of North Carolina System. Sometimes discounts are available through one or more of these avenues.

- Could other products of interest be included in our purchase? With so much money to spend with a short turnaround time, we found ourselves asking about corresponding products or more coverage years. Perhaps we had priced out backfiles for five out of ten available collections, and were able to negotiate for bigger discounts upon purchasing more collections, which made the total cost still in our ballpark.
- What are the ongoing access fees, and can those be negotiated? Many vendors will allow you to pay the ongoing fees for a certain number of years, if local accounting policies allow for this. Also, there may be ways to lower the ongoing access fees, if there is a product with a large one-time cost.

We approached our vendors with an attitude of professional friendliness, and tried to make the best match between our needs and their needs. We did require a fast turnaround time: we needed those invoices and the access within days which was difficult for some companies to manage. Because of the time pressure we were under, we learned quickly that when vendors weren't able to meet our turnaround-time needs or weren't quickly responsive to our questions and needs for information, we abandoned our efforts to work with them and moved on to vendors who were more agile.

Sometimes vendors were surprisingly unresponsive: the end of the fiscal year sometimes falls at conference time, and this year, the Special Libraries Association annual meeting and the American Library Association annual meeting both fell during the last few weeks of the fiscal year. Many vendors' sale staffs were away for conferences. After leaving voice mail and email, we sometimes abandoned our plan to procure a large backfile or collection, because no one was in the office to take our calls at the end of the fiscal year.

Also, at times, vendors were unable to negotiate, and sometimes unable to get us an invoice within the short timeframe we needed. As unfortunate as this situation can be for both the vendor representative and for us, the constraints on us were firm and imposed by the university. The constraints gave us a structure to work within, and only the vendors who could respond to that structure were the ones we could finally use. Vendors can help remedy this situation by having a better mutual understandings and communications between the sales, licensing, billing, and technical support branches of the company about the urgency of requests that come at year's end. They may also want to instill a practice of negotiating prices with products that are extremely expensive, perhaps prohibitively so for smaller universities and colleges, where these kinds of monies only come once in a lifetime.

As methodically as we describe this process, it often is anything but. Some typical problems that arise in the negotiation and procurement stages:

- The sales department of the company was unable to get their accounting department to generate a one-line invoice – or any bill at all.
- The licensing department has a different definition of “urgency” than the sales department.
- A selector has indicated to the vendor that we will assuredly buy something that we found out costs more than thought. When we have to back out, the vendor is frustrated as are we.
- In one case, there was a large set that the sales rep had no price negotiating authority and it was clear their manager had no idea how to price the product competitively.
- After we had encumbered the \$1.6 million, we signaled the Business Office on Thursday June 26, that we were able to spend up to another \$750,000 in two chunks. They said yes.
- Because of the timing of ALA, the acquisitions head left for the meetings, and the head of cataloging, Paul Orkiszewski, a wonderful colleague and former acquisitions head librarian stepped in to finish some large deals on the afternoon of Friday June 27, our drop-dead date.

An analytical mindset and a sense of humor are important qualities to solving the constant puzzles offered in the negotiation and procurement process. An analytical mindset helps keep details organized throughout the hectic phone calls and library work. A sense of humor keeps everyone from the library colleagues and staff to the vendors in a good mood despite all of the strange situations which arise.

### **Cleaning Up After the Two Weeks**

When we finally put through our last invoice for a quarter million dollars, there was a collective exhale throughout the acquisitions department. However, we knew that all of our work had not been finalized, and that the work of obtaining these new digital resources had just begun for other teams in the library.

For cataloging, we needed to make a list of all the new products and detail items for which we had bought MARC record sets and those which needed more individualized attention. It is best if the collections or acquisitions librarian can speak with the cataloguers ahead of time to troubleshoot any issues and ask the right questions of the vendor before the sale is made. In our case, we consulted with the head of cataloging and a lead cataloguing team member about various questions related to our purchases before we actually made the sale. During that time period, when the vendors know of your strong interest but you haven't committed to a product, librarians have the most leverage to command the attention of the technical staff at the company and ask tough questions answered about the availability and quality of MARC records and the ease of adding new collections to our catalog.

Also, consulting with acquisitions staff throughout the process is important to staff morale and a feeling of team spirit. With such a large project and a short turnaround time, it would have been easy for the lead negotiators to sequester themselves with a telephone and computer until the money had been spent. However, acquisitions team member, need to understand the full scope of the issues and the

work at hand. Even staff members who focus primarily on monographic acquisitions were brought into the conversation so that they knew what stress had been placed on the accounting and e-products/serials ordering staff during those two weeks. Everyone tried to maintain a good spirit, and we had an ice cream party to celebrate the hard work of the staff and the new resources.

Once everything is turned on and working, subject liaisons or departmental liaisons then pick up the ball with publicity and training opportunities for all the new products. There can be a steep learning curve with new digital collections, and it is important that subject specialists are prepared to delve into the new products and learn them as quickly as possible so that they can promote them to their faculty members, start using them in instruction sessions, point them out at the reference desk, and other publicity-oriented activities to get the word out about the new expenditures.

Throughout the publicity efforts, it may be wise to balance enthusiasm and thanks (to the business affairs office or similar) for the money to purchase the collections with a certain discretion about the amount of end-of-the-year money received by the library. After all, other departments and their faculty may have had similar requests in for money which were not granted, and if the university has a large pool of end-of-year money, it may not be wise to be indiscrete about the amounts.

## **Final Lessons**

Our conclusions from this experience led to lessons which would be applicable to vendors and to librarians.

### **Five Lessons for Vendors**

1. Be aware of your clients' fiscal year. Call libraries early – in April for a June fiscal year calendar end – and ask about end of the year money.

2. Review your client's holdings and make suggestions. Know what your client has and what they might need. With the proliferation of information on university websites, it is be appropriate to look at the departmental homepage for certain disciplines within the university as well as the library's holdings or databases page.
3. Make sure that your company has strong communication links between the sales department and the licensing and invoicing departments. It is important to have good technical support as well, but the speedy turnaround time required at year's end is needed most in obtaining a correct invoice and getting the licensing details settled.
4. Ensure your availability at the fiscal year end. Check voice mail and email, or have a competent back-up who can help with orders while you are traveling.
5. Don't leave the customer hanging after the sale. Make sure that products are turned on and without glitches, and if the university accounting rules require it, that these products work before the end of the fiscal year.

End-of-the-year money can be an opportunity for congruence among the needs of patrons, librarians, the university, and vendors. If we are all equally prepared for quick action, and do not waste time, this can be the occasion for great resources. In order to prepare our colleagues in libraries, we considered the following suggestions to be of relevance.

#### **Ten Lessons for Librarians**

1. Do homework in early spring to prepare an itemized wishlist with the cost and terms of available products. Digitized backfiles of serials and journal collections, digitized historical documents and primary sources, ebook collections, and digitized newspapers all make excellent choices for this type of one-time money expenditure.
2. Have your list prepared to send before anyone asks for it.



3. Be bold.
4. Have only one person talk to only one person. This rule may apply to the business affairs office or to the relationship between library and vendor. This tenet essentially replicates the advice of “too many cooks in the kitchen spoils the soup.”
5. Know when to move on. As hard-hitting and stern as it may seem, in this situation, we are the customers, and we have all the money. Once we have committed or expressed sincere and strong interest in a product, vendors should really be working full-time at meeting our needs. They should be quick to respond to questions and problems and quick to provide licenses and invoices, as well as answers to crucial questions. If they cannot do this, then there are plenty of other vendors out there who are hungry for the sale and have wonderful resources which the campus also needs.
6. Be clear and firm with selectors. Don’t commit to products or give unreasonable promises about what we can purchase. Unfortunately, sometimes negotiations break down or you need to be able to walk away from a deal because of difficulties with the terms or price. If the selectors understand the process and the reasons why the deal failed as an end-of-year purchase, everyone is much more satisfied with the results of the process.
7. Deal in good faith with vendor representatives. While we strongly encourage assertive negotiating on pricing and access terms, we would never recommend leading a vendor to think that a purchase was imminent if it is not. We advocate a straightforward attitude and honesty in negotiations and conversations about products. This advice extends to the vendors as well.
8. Get permission to speak directly with the campus accounts payable, Academic Affairs, the budget or controller’s office. It is too difficult in crunch time to have to speak through the director or dean of libraries. If you can be trusted to spend the money, you

should be trustworthy enough and have enough authority to speak directly to the campus budget directors.

9. Stay within the auditor's rules. Don't violate guidelines or local policies just to make a sale happen. For us, this meant we could not pre-pay invoices (paying twice for a product within the same fiscal year) and we must receive – technically, having access turned on to a digital product – the product before the end of the fiscal year.
10. Be as flexible as a yogi. The constraints we place – whether it's how much money we can spend, how much advance notice we need, how much time we need to get the work done – limit the opportunities available to the library. End-of-the-year money may be the one chance that the library has to procure fantastic but prohibitively expensive research materials.